

# Project Planning Phase: Streamlining Ticket Support Operations

Date	2-11-2025
Team id	NM2025TMID04066
Project name	Streamlining ticket support for efficient support operation
Team members	4

## Project Planning Phase: Streamlining Ticket Support Operations

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### Objective

To develop a comprehensive and actionable plan that defines *how* the ticket support streamlining project will be executed, monitored, and controlled — ensuring clear scope, resources, timelines, and risk mitigation.

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### Key Goals

1. Define clear **project scope**, deliverables, and success criteria.
  2. Develop a **work breakdown structure (WBS)** with realistic timelines.
  3. Allocate **resources** (people, technology, and budget).
  4. Identify **dependencies and risks** with mitigation strategies.
  5. Create a **communication and change management plan**.
  6. Finalize **project governance** (roles, responsibilities, and reporting structure).
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### Major Planning Activities

Activity	Description	Key Outputs
<b>1. Define Project Scope</b>	Identify which support operations will be improved (ticket routing, automation, agent tools, analytics, etc.) and which are out of scope.	Scope statement, inclusion/exclusion list
<b>2. Develop Work Breakdown Structure (WBS)</b>	Break the project into manageable tasks (e.g., discovery, design, build, pilot, rollout).	WBS diagram, task list
<b>3. Schedule &amp; Timeline Planning</b>	Create a detailed timeline with milestones for each phase (e.g., Discovery, Solution Design, Implementation).	Gantt chart / project timeline

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Activity	Description	Key Outputs
<b>4. Resource &amp; Budget Planning</b>	Identify required resources: tools, personnel (agents, IT, AI specialists), and financial costs.	Resource allocation plan, budget estimate
<b>5. Risk Assessment &amp; Mitigation</b>	Identify potential risks (e.g., system downtime, data migration issues, agent resistance). Develop mitigation and contingency plans.	Risk register, mitigation strategy
<b>6. Communication Plan</b>	Define how stakeholders will receive updates, and what information will be shared (status reports, dashboards).	Communication matrix, reporting cadence
<b>7. Quality Management Plan</b>	Define how process improvements will be measured and validated (SLAs, QA metrics, CSAT).	Quality standards document
<b>8. Change Management Strategy</b>	Outline training, support, and adoption tactics for new workflows and tools.	Change management plan
<b>9. Procurement Planning (if needed)</b>	If new tools (AI routing, chatbots, ticketing platforms) are to be procured, define vendor selection and evaluation process.	Procurement plan, vendor evaluation matrix
<b>10. Approval &amp; Baseline Setup</b>	Present the complete project plan for stakeholder approval and baseline establishment.	Approved project plan, project baseline

## Stakeholders and Roles

Role	Responsibility
<b>Project Manager</b>	Lead planning phase, develop timeline, manage documentation
<b>Support Operations Lead</b>	Define process improvement scope, identify bottlenecks
<b>IT/Systems Architect</b>	Identify technical dependencies, integrations, and tool requirements
<b>Automation/AI Specialist</b>	Evaluate automation opportunities and AI integration potential
<b>Finance/Procurement</b>	Approve budgets, manage vendor engagement
<b>Change Management Lead</b>	Develop communication and training plans
<b>Executive Sponsor</b>	Approve project plan and allocate resources

## Deliverables from the Planning Phase

1. ✓ **Project Charter (Updated)** — with clarified objectives and scope
  2. ✓ **Detailed Project Plan** — including WBS, schedule, and dependencies
  3. ✓ **Resource & Budget Plan**
  4. ✓ **Risk Management Plan**
  5. ✓ **Communication & Governance Plan**
  6. ✓ **Change Management & Training Plan**
  7. ✓ **Baseline KPIs** (for measuring improvement post-implementation)
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## Success Criteria for the Planning Phase

- All deliverables approved by key stakeholders.
- Project scope, milestones, and KPIs clearly defined and documented.
- All risks have documented mitigation strategies.
- Project team roles and responsibilities are confirmed.
- Go-ahead sign-off granted to proceed to **Execution Phase**.